PathOS: Cloud-Based Workload Management Software

Overview

PathOS is C!A's proprietary workload management system that allows organizations to collect, monitor, and report field operations and workloads in real time. At any given minute of the day, leadership is able to understand workload by type or availability of resources, and receive guidance in matching the two to optimize production for the best possible outcomes.

PathOS provides you with:

- Lobby and non-lobby management queuing system (worker inbox);
- Real-time dashboard of the organization's workload, key metrics, and workforce availability and performance;
- Real-time tracking of key metrics such as (a) transaction times, (b) aging status of work items (wait times stated in days for non-lobby work; minutes/hours for customers in the lobby), and (c) completion rates (worker actions ending on a determination instead of pending);
- Ability to interface with business systems such as document imaging, telephony, and eligibility systems;
- Bundling of related outstanding case actions;
- Ability to search and find specific cases, worker transactions, case outcomes, or processing track information;
- Ability to temporarily suspend case transaction times, e.g., lunches and training;
- Client history (by unique client/case ID); and
- Data retention, trending, and multi-level data views (individual worker > team > office > region) configurable to your organization.

Real-time Performance Analytics

PathOS provides robust functionality to track how long customers are waiting and help with the check in-process for walk-in/scheduled customers. At its core, PathOS is designed to primarily leverage a team-based task management workflow model. Therefore, workers are commonly assigned to specific "teams" (i.e. queues or pathways) that use a "next case," or pull mechanism for task management, drawing work from the sequence of work items that PathOS is collecting, organizing, and managing. The ability to monitor and report on scheduled appointments is also part of the PathOS feature set.

Once a work item is entered into PathOS, the system immediately begins tracking, monitoring, and measuring the wait time duration, regardless of what access point the task entered the system. The wait time is aggregated for all similar work items outstanding and becomes an integral part of reporting in the management desktop/dashboard, providing supervisors and managers with instant access to real-time information about the amount, type, and aging status of outstanding or unclaimed work items.

The check-in process is the integral effort of "triaging," or assessing the exact needs of the customer before they are assigned to the appropriate team or individual. For instance, a customer who checks in and is determined to be eligible for "expedited service" can be accordingly flagged at the time of check-in as a high-priority case, or what PathOS refers to as an "Express Route" case, and then appropriately sequenced at the "front of the line" such that the customer will be directed to the next available resource that is appropriately trained and capable of providing the level of service or the specific skills necessary to satisfy the customer.

PathOS is designed to be flexible and adaptable to varying business process models so that it can accommodate a myriad of check-in interactions, or sources, such as:

- Allowing for customers to be greeted and triaged for services as an on-demand interaction via a walk-in visit to an office lobby;
- Customer work can be obtained, triaged, and entered as a non-lobby interaction, such as documentation that was dropped off at an office location, mailed in, or faxed in;
- Customer needs can also be entered as incoming or outbound telephone calls;
- Customer interactions can be uploaded, by office personnel en masse, as tasks that originate from other systems or reporting sources;
- And with additional configuration, PathOS can integrate with other systems through our Application Program Interface (API) that allows tasks to be generated directly from other systems or possibly initiated by other external processes that may originate with another agency.

Executive Dashboard
PathOS provides executive reporting at all levels of an agency's structure, from individual offices (including individual, team/service track, and all lobby tracks together) to a division or department. The dashboard allows the viewer to quickly access the health of all offices (according to security-controlled access rights), with any measures that do not meet highlighted threshold(s). Additional detail is available for any location and measurement.

Reporting
The PathOS workload management system operates "above" existing processing systems, allowing PathOS to report on transactional metrics across all systems, regardless of where the transaction was processed. It can also act as an agency's workload tracker, should the agency not currently have one that functions properly. PathOS provides a wealth of real-time reporting data, as well as historical reporting at multiple organizational levels and at past dates or date ranges. It captures key performance metrics in all service pathways, including wait time, interview duration, time between interviews, and work completion rate.

Customizable Ad Hoc Reporting
PathOS generates reports within all areas of work created by an agency during the course of the day. Each of these reports are available for print, on demand and in real time. Offices can compare reports in PathOS from day-to-day, month-to-month, or year-to-year.

Productivity Tracking Tools
PathOS tracks, measures, and reports – in real time – the transaction time duration (or productivity measure) for all workers using the system to manage their tasks. PathOS utilizes key trigger events in the workflow process that are manually initiated by workers in order to establish time stamps. These time stamps facilitate the calculation of a worker's utilization and productivity associated with a customer's specific case action or task.

The time stamps work universally to calculate transaction time durations regardless of whether the workers are working at specific and assigned office locations, or remotely as teleworkers. PathOS also leverages configured "teams" (or work queues) to track and manage work. Agencies using PathOS often configure specific "telephone" work queues to specifically track and monitor key performance measures associated with telephone interviews/workload.